



# *First Steps to Take*

## What should I do?

---

The Funeral Director will assist each family with any and all of the items listed and many others at the arrangement conference. The funeral home will help coordinate arrangements with the cemetery.



Some information to complete the State vital statistic requirements.

- Birth Date
- Birthplace
- Father's Name
- Mother's Name
- Social Security Number
- Veteran's Discharge or Claim Number
- Education
- Marital Status

- Contact your clergy. Decide on time and place of funeral or memorial service. This can be done at the funeral home. The funeral home will assist you in determining the number of copies of the death certificates you will be needing and can order them for you.
- Make a list of immediate family, close friends and employer or business colleagues. Notify each by phone.
- Decide on appropriate memorial to which gifts may be made (church, hospice, library, charity or school).
- Gather obituary information including age, place of birth, cause of death, occupation, college degrees, memberships held, military service, outstanding work, list of survivors in immediate family, and provide time and place of services. The funeral home will assist you in writing the article, during your family conference; and submit to newspapers (newspaper will accept picture and they will be returned intact).
- Arrange for members of family or close friends to take turns answering door or phone, keeping careful record of calls.
- If Social Security checks are automatic deposit, notify the bank of the death.

**Catholic Cemeteries**

**[www.holyroodcemetery.org](http://www.holyroodcemetery.org)**

**516.334.7990**



- Coordinate the supplying of food for the next several days.
- Consider special need of the household, such as cleaning, etc., which might be done by friends.
- Arrange for childcare, if necessary.
- Arrange hospitality for visiting relatives and friends.
- Select pallbearers and notify the funeral home. (Avoid anyone with heart or back difficulties, or make them honorary pallbearers).
- Plan for disposition of flowers after funeral (family home, church, hospital or rest home)
- Prepare list of distant persons to be notified by letter and/or printed notice, and decide which to send to each.
- Prepare list of persons to receive acknowledgments of flowers, calls, etc. Send appropriate acknowledgments (can be written note, printed acknowledgments, or some of each). Include "thank you's" to those who have given their time as well.
- Notify insurance companies.
- Locate the will and notify lawyer and executor.
- Check carefully all life and casualty insurance and death benefits, including Social Security, credit union, trade union, fraternal, and military. Check also on income for survivors from these sources.
- Check promptly on all debts and installment payments, including credit cards. Some may carry insurance clauses that will cancel them. If there is to be a delay in meeting payments, consult with creditors and ask for more time before the payments are due.
- If deceased was living alone, notify utilities and landlord and tell post office where to send mail.
- Funeral Director will prepare Social Security Form SSA 721. Check with Social Security to see that number is retired.



# **Checklist**

## **FAMILY TASKS AND FINANCIAL CHECKLIST**

The paper work and getting documents together at the time of a death can seem overwhelming or intimidating. We are looking for ways to serve you better and have put together some of the reminders that families have found helpful. Most of these items will be readily available, but you may need to search for others. We have grouped these items so that you can easily go down the list.

- Find the most recent will.
- Order certified copies of the death certificate (The Funeral Home will assist you with this task.)
- Locate safety deposit box for documents if possible
- Bank statements, records-check cards
- Bills(current ones, needing to be paid)
- Birth Certificates of the deceased and any minor children
- Business ownership or partnership papers
- Credit Cards-Bank Cards
- Insurance records( Policies and payment receipts)
- Loan documents( those currently in force)
- House and Property records (land titles, deeds, assessment notice, and records of rental properties)
- Marriage certificates
- Military discharge papers
- Motor vehicle titles and registration
- Pension records
- Safety deposit boxes( locations and keys)
- Savings bonds
- Social Security numbers for the deceased, survivors and minor children.
- Stocks and bonds( certificates, names of brokers)
- Tax records ( old returns, current year)

Organize the documents according to those you need immediately to assist with the funeral arrangements. Keep the others handy for future use. Organize them in a file folder and keep them in a safe place till needed.



## Helpful Items to Remember

---

The following are some of the things that will need to be completed according to your specific needs.

- Notify deceased's Employer and personnel or insurance department.
- File Insurance claims for each policy held. We will assist at No Charge.
- File appropriate health insurance claims, notify them that a death has occurred.
- Notify your home, health, business and auto insurance companies. Cancel or change as appropriate.
- The Funeral Home will notify Social Security of the death. You will have to contact Social Security about benefits, etc. (1-800-772-1213)
- Contact us if you need help probating the will.
- Contact us if you need help with updating your will or trust.
- Contact the financial institutions holding the mortgage on the deceased's home or other outstanding loans.
- Contact banks to cancel checking accounts held by the deceased or remove name.
- Revise titles on checking/savings accounts and safety deposit boxes.
- Transfer assets as appropriate.
- Cancel any direct deposit payments that are made in the name of the deceased.
- Contact the Veterans Administration (if applicable).
- Check on monies held in credit unions.
- Cancel credit cards and charge accounts.
- Cancel subscriptions and memberships; Labor unions and Fraternal Organizations.
- Cancel medical coverage and other types of insurance on the deceased.
- Change beneficiary on insurance policies, retirement accounts, Certificates of deposit, savings bonds, etc.
- Change ownership of joint or solely owned stocks and bonds.
- Transfer or close IRA and retirement accounts or other investments managed by broker.
- Cancel or re-direct the deceased's mail according to specific needs.
- Cancel or re-name utility billing. (This includes, gas, water, electric, cable TV)
- Cancel any apartment rental agreements of the deceased.
- Check on status of Automobile. (payments due, insurance, etc).
- Revise titles on your car(s) or other titled property.
- Cancel or re-direct maintenance agreements. (this includes Gardeners, Cleaning Services, or other types of regularly scheduled maintenance or service activities).
- Contact your funeral director to order a Monument.

**NOTE:** This is only a suggested checklist. It is not intended to replace appropriate legal or financial counsel.